

27. Approve Amendment #2 to RFP-484-00/BJC – Consultant Services Agreement for Management of the Seminole County’s Road, Stormwater and Traffic Facility Systems, with LA Associates Consulting, Inc., El Segundo, CA (\$237,259.00).

RFP-484-00/BJC provides for services related to management of the County’s road, stormwater, and traffic facility systems. The services requested include, but are not necessarily limited to the following:

- Create maintenance activity inventory and related database
- Identify best work practices, materials, and technologies
- Assist in the selection and integration of software designed to facilitate easy recording, storage, recovery and forecasting of information
- Assist in the automation of work scheduling and customer response
- Involve the service delivery workforce as well as management
- Observable service, quality, and cost advances within approximately 15 months.

The implementation of 21 out of the 28 recommendations from the Maintenance Review Report by LA Associates Consulting, Inc., and guidance from the firm in the implementation of the Maintstar software application, has resulted in the following management highlights:

- Implementation of a department wide system with associated software (27 data bases were eliminated);
- More efficient work is being done (9 out of 10 major activities improved);
- Decisions made on streamlining organization, resources, and data bases have resulted in savings to the County;
- Accountability affirmed as all work done is captured and 80% of all efforts tracked to a specific maintenance activity;
- Better planning – it is activity-based and outcomes established by function and district;
- Scheduling system established (bi-weekly schedules);
- Customer response captured and integrated (11,000 service requests);
- Enhanced staff skills through guidance and training in the use of computers, software and handheld units.

LA Associates Consulting, Inc. has assisted in the creation of a much customized system to meet Seminole County’s specific needs. Their expertise in Public Work’s operational processes and system would enable the County to more effectively implement refinements or enhancements as needs evolve and grow.

Amendment #2 will provide for the integration of the system into both engineering and maintenance operations. This action will also support use of the County's existing GIS with MaintStar. The amendment will also include multi-year support for the update and enhancement of 2003-2004, 2004-2005 and 2005-2006 annual work plans. Future potential improvements include:

- Configuration of Maintstar for right of way permitting;
- Continued enhancements of the system for maintenance operations by fine tuning annual plans based upon actual data as the system captures more information as the years progress (2003-2004, 2004-2005);
- Establish an internal request process for survey and right of way work requests;
- Develop ability to store asset condition rating information in Mainstar to use for GASB 34 modified approach compliance.

Amendment #2 will also extend the contract time until December 31, 2005 to allow for the completion of the tasks as delineated in the scope of services. The following is the summary of the contract and a breakdown of the maximum allowable compensation and term:

Original Contract Sum	\$166,000.00
Amendment #1	8,238.00
Add Amendment #2	<u>237,259.00</u>
Revised Contract Sum	\$411,497.00

Evaluation and Configuration of MaintStar for ROW permitting	\$18,566	Fiscal Year 02-03
Training and guidance in system setup	\$41,069	Fiscal Year 03-04
Enhancement of system and establishment of 2003-4	\$39,100	Fiscal Year 02-03
Establish Internal Request for Process for Survey and Right of Way locations	\$31,505	Fiscal Year 04-05
Develop asset condition rating system	\$27,567	Fiscal Year 03-04
Annual support for 04-05 update and enhancement	\$40,675	Fiscal Year 03-04
Annual support for 05-06 update and enhancement	\$38,776	Fiscal year 04-05

Authorization for performance of services by the Consultant under this agreement shall be in the form of written Work Orders issued and executed by the County and signed by the Consultant.

Funds are available in account number 077600-53031000 (Stormwater-13000, Professional Services). Public Works and Fiscal Services/Purchasing and Contracts Division recommend the Board to approve and authorize the Chairman to execute the Amendment as prepared and approved by the County Attorney's Office.

**SECOND AMENDMENT TO CONSULTING SERVICES AGREEMENT (RFP-484-00/BJC) I
MANAGEMENT OF ROAD, STORMWATER AND TRAFFIC FACILITY SYSTEMS**

THIS SECOND AMENDMENT is made and entered into this ___ day of _____, 20___, and is to that certain Agreement made and entered into on the 22nd day of September, 2000, between L A CONSULTING, INC., whose address is 840 Apollo Street, Suite 324, El Segundo, California, hereinafter referred to as CONSULTANT, and SEMINOLE COUNTY, a political subdivision of the State of Florida, whose address is Seminole County Services Building, 1101 East First Street, Sanford, Florida 32771, hereinafter referred to as COUNTY.

W I T N E S S E T H:

WHEREAS, the CONSULTANT and COUNTY entered into the above referenced Agreement on September 22, 2002, as amended on August 27, 2002, for consulting services regarding the management of road, stormwater and traffic facility systems; and

WHEREAS, the parties desire to amend the Agreement so as to enable both parties to continue to enjoy the mutual benefits it provides; and

WHEREAS, Section 22 of the Agreement provides that any amendments shall be valid only when expressed in writing and duly signed by the parties,

NOW, THEREFORE, in consideration of the mutual understandings and agreements contained herein, the parties agree to amend the Agreement as follows:

1. Exhibit "A" of the Agreement, Scope of Services, is amended by the addition of the services as described in Exhibit "A", attached hereto.

2. Section 5 of the Agreement is amended to read:

SECTION 5. COMPENSATION. The COUNTY agrees to compensate the CONSULTANT for the professional services called for under this Agreement on a "Fixed Fee" basis. When a Work Order is issued for a "Fixed Fee Basis," then the applicable Work Order shall provide for no reimbursable expenses. The total amount of compensation paid to the CONSULTANT for all work performed pursuant to this Agreement, including reimbursable expenses shall not exceed the sum of FOUR HUNDRED ELEVEN THOUSAND FOUR HUNDRED NINETY-SEVEN AND NO/100 DOLLARS (\$411,497.00).

2. Section 2 of the Agreement is amended to read:

SECTION 2. TERM. This Agreement shall take effect on the date of its execution by the COUNTY and shall run until December 31, 2005. Expiration of the term of this Agreement shall have no effect upon Work Orders issued pursuant to this Agreement and prior to this expiration date. Obligations entered therein by both parties shall remain in effect until completion of the work authorized by the Work Order.

3. Except as herein modified, all terms and conditions of the Agreement shall remain in full force and effect for the term of this Agreement, as originally set forth in said Agreement.

IN WITNESS WHEREOF, the parties hereto have executed this instrument for the purpose herein expressed.

ATTEST: L A CONSULTING, INC.

, Secretary By: _____
HARRY C. LORICK, President

(CORPORATE SEAL) Date: _____

ATTEST: BOARD OF COUNTY COMMISSIONERS
SEMINOLE COUNTY, FLORIDA

MARYANNE MORSE By: _____
Clerk to the Board of DARYL G. MCLAIN, Chairman
County Commissioners of
Seminole County, Florida. Date: _____

For the use and reliance of Seminole County only. Approved as to form and legal sufficiency. As authorized for execution by the Board of County Commissioners at their _____, 20___, regular meeting.

County Attorney

AC/gn
Attachment
Exhibit "A" - Scope of Services
CAGN01\AGT\2am-484-00.doc



Lorick Associates
CONSULTING

January 13, 2003

Mr. Mark Flomerfelt
Seminole County
Public Works
520 W. Lake Mary Blvd.. Ste. 200
Sanford, FL 32773

Mr. Antoine I Khoury
Principal Engineer
Seminole County
Public Works
520 W. Lake Mary Blvd.. Ste. 200
Sanford, FL 32773

Re: Proposal 02-44: Support for Public Works for Right of Way Permitting and Guidance in Enhanced System Use.

Dear Mark and Antoine:

Pursuant to my discussion with Ms. Cindy Driggs and our prior meeting last month, we have prepared a revised scope of work to assist the County to more fully use the MaintStar system to further automate, enhance and improve your operations.

We have compiled seven groups of work tasks in a multiyear effort to assist maintenance operations and associated engineering permitting and support. These work groups include:

- Group I – Evaluation and configuration of MaintStar for right of way permitting.
- Group II – Training and guidance in system setup.
- Group III – Enhancement of system for maintenance operations and establishment of 2003-4 plan.
- Group IV – Establish internal request process for survey and right of way locations.
- Group V – Develop ability to store asset condition rating information in MaintStar.
- Group VI – Enhancement and annual work plan support for 2004-5.

"We Help Public Works Work"

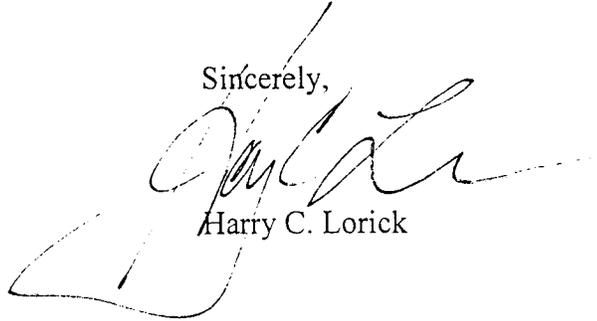
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Phone: 310-374-5777 • Fax: 310-374-5557 • email: lacon@ix.netcom.com
1209 Manhattan Ave, Suite 310 • Manhattan Beach, CA 90266
Internet address: www.laconsulting.com

Group VII – Enhancement and annual work plan support for 2005-6.

This will also support use of the County’s existing GIS with MaintStar. We have outlined a detailed scope for these groups with a general time frame and cost estimate.

We look forward to assisting the County in making the best use of the system in the most efficient manner. We believe this support will allow continued efficient service by Public Works to the Board, other agencies and public.

Sincerely,



Harry C. Lorick

cc: Pamela Hastings
Ira Barrow
Cindy Driggs
A. Drotning

Seminole
County
Cost by Task

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TASK	Cost	Fiscal Year
Group I - Evaluation and Configuration of MaintStar for ROW permitting		
		FY02-3
1 Project initiation	\$3,376	
2 Review current databases	\$4,782	
3 Document missing elements	\$4,782	
4 Develop system goals	\$5,626	
Subtotal		\$18,566
Group II - Training and guidance in system setup		
		FY03-4
5 Install software for engineering and new permit users	\$2,250	
6 Configuration of software	\$7,314	
7 Software training support	\$4,219	
8 Labor and permit types	\$2,813	
9 Develop new permit system	\$4,219	
10 Monitor system	\$2,813	
11 Develop system documentation	\$5,063	
12 Conduct system implementation	\$4,501	
13 Review committee meetings	\$3,657	
14 Monthly status	\$4,219	
Subtotal		\$41,069
Group III - Enhancement of System and Establishment of 2003-4		
		FY02-3
15 Guide in update of Annual plan for 2003-4 with GIS	\$39,100	
Subtotal		\$39,100
Group IV - Establish Internal Request Process for Survey and Rights of Way locations		
		FY04-5
16 Survey and ROW request initiation	\$1,969	
17 Review current databases	\$2,250	
18 Document missing elements	\$2,532	
19 Develop system goals	\$2,813	
20 Install software for engineering and new ROW location	\$1,969	
21 Configuration of software	\$5,063	
22 Software training support	\$1,688	
23 Develop and implement system	\$4,501	
24 Monitor system	\$2,532	
25 Develop system documentation	\$2,532	
26 Conduct Implementation training	\$3,657	
Subtotal		\$31,505
Group V - Develop asset condition rating system		
		FY03-4
27 Determine asset features and measurement units	\$6,189	
28 Establish database fields	\$6,751	
29 Establish trial dataset	\$5,626	
30 Develop reports	\$5,063	
31 Document and train Staff	\$3,938	
Subtotal		\$27,567
Group VI - Annual support for 04-05 update and enhancement		
		FY03-4
32 Orientation	\$1,577	
33 Activity Guideline Review and Update	\$6,937	
34 System review	\$5,045	
35 Inventory and resource update	\$2,207	
36 Service level review and update	\$2,522	
37 Work program Update	\$6,937	
38 Work distribution	\$4,730	
39 Resource needed for 2004-5	\$1,261	
40 Biweekly review and enhancement	\$2,838	
41 Monthly review and enhancement	\$2,838	
42 General support and guidance	\$3,784	
Subtotal		\$40,675
Group VII - Annual support for 05-06 update and enhancement		
		FY04-5
43 Orientation	\$1,716	
44 Activity Guideline Review and Update	\$7,549	
45 System review	\$5,490	
46 Inventory and resource update	\$2,402	
47 Service level review and update	\$1,029	
48 Work program Update	\$3,775	
49 Work distribution	\$3,088	
50 Resource needed for 2005-6	\$1,373	
51 Biweekly review and enhancement	\$3,088	
52 Monthly review and enhancement	\$3,088	
53 General support and guidance	\$6,177	
Subtotal		\$38,776
Total		\$237,259

**Seminole County
Cost by Year**

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	FY02-3	FY03-4	FY04-5
Group I – Evaluation and Configuration of MaintStar for ROW permitting	\$18,566		
Group II – Training and guidance in system setup		\$41,069	
Group III - Enhancement of System and Establishment of 2003-4	\$39,100		
Group IV - Establish Internal Request Process for Survey and Rights of Way locations			\$31,505
Group V - Develop asset condition rating system		\$27,567	
Group VI - Annual support for 04-05 update and enhancement		\$40,675	
Group VII - Annual support for 05-06 update and enhancement			\$38,776
Total	\$57,666	\$109,311	\$70,281

SCOPE OF WORK FOR MULTIYEAR SUPPORT FOR PUBLIC WORKS RIGHT OF WAY PERMITTING AND GUIDANCE IN ENHANCED SYSTEM USE

This scope is divided into seven work groups for fully integrating the existing system into both engineering and maintenance operations. This will also support use of the County's existing GIS with MaintStar. This amounts to a total of 53 tasks. This scope covers effort for engineering, traffic and M & O. It will occur that some work tasks could be done concurrently for these three divisions. Groups include multiyear support for the update and enhancement of 2003-4, 2004-5 and 2005-6 annual work plans.

The main groups include:

- Group I – Evaluation and Configuration of MaintStar for right of way permitting.
- Group II – Training and guidance in system setup.
- Group III – Enhancement of system for maintenance operations and establishment of 2003-4 plan.
- Group IV – Establish internal request process for survey and right of way locations.
- Group V – Develop ability to store asset condition rating information in MaintStar .
- Group VI – Enhancement and annual work plan support for 2004-5.
- Group VII – Enhancement and annual work plan support for 2005-6.

The description of each of these tasks follows. These descriptions include the process, methods and procedures to be used, and the end product that can be expected from the task.

APPROACH

Through prior work for the County, LAC has assisted in the development of existing systems for roads, traffic and storm water maintenance. The County now desires to link work permitted in the right of way into the existing automated system and to reconfigure the MaintStar database to perform this function. Further, the County wants to enhance the use of the existing MaintStar system capabilities and receive mentoring on an annual update for 2003-2004 work plans. Finally, the County desires to establish an internal way to

request support from engineering by M & O staff, use the existing automated system and to reconfigure the MaintStar database to perform this function. Hence, the effort will be a combination of evaluation of engineering right of way permit needs and associated training, importation and database population and transfer.

LAC understands the County's needs for using the MaintStar software to track permits and will work closely with the County to allow for successful installation and implementation of MMS software that both replaces the manual and Access systems and provides for enhanced technology and ability to link with GIS and other systems.

LAC also understands the importance of providing comprehensive training on the new software capabilities as well as on-going support to allow the County to maintain and update the new system without additional support from the software vendor or other outside agencies.

GROUP I - EVALUATION AND CONFIGURATION OF MAINTSTAR FOR ROW PERMITTING

Our approach for this group will establish a solid foundation on which the efforts of the configuring and tailoring of the MaintStar database can be done. The objective of this group is to convey a sound understanding of the methods that will be used to collect and analyze existing manual and database information, establish working relationships and committees, and coordinate LAC and County resources.

TASK 1 – PROJECT INITIATION

The following tasks are intended to familiarize County staff with the approach that LAC will take to select and implement the updated permit operation. The tasks will also serve to educate LAC on all the County's desires for the system configuration.

TASK 1.1 - PROJECT STARTUP

During this first task, we will begin our team planning efforts associated with the project. LAC will initiate the project immediately after the contract is signed. LAC staff will conduct an initial meeting with the engineer in charge of permitting and his key staff along with staff in M &O, who perform inspections, to review the County's objectives and their perception of the needed system and components.

Structured interviews will also be conducted with key staff that has an impact on the controlling and directing of permits as well as those in Engineering who may have a desire to utilize the information. Ideas on current aspects of the systems that are positive and negative, along with concepts for enhancements will be obtained. The objective of these sessions is to develop working relationships with key staff and a general understanding of

key staff objectives. Meetings will be held to further refine our approach and methodology to effectively accommodate the specific needs and desires of the County.

End Product: Key County staff will be consulted and concepts for improvements and enhancements will be prepared.

Based on our system observations and discussions in the initial task, LAC will prepare a detailed approach along with milestones. The tasks will be further defined with milestone changes in the project schedule if information obtained from Task 1.1 warrants changes.

End Product: A detailed schedule with training and enhancements planned.

TASK 1.3 - ESTABLISH A REVIEW COMMITTEE

To ensure an effective program, operational effort and credibility with all levels of the organization, a Review Committee will be established. The group, comprised of management staff of various DPW personnel, shall be updated at major milestones and provide direction to the consultant. In addition, the committee will periodically review progress and accomplishments and provide the consultant with guidance and counsel. The committee members will develop a firsthand understanding of the system development as they are documented and presented. This method will promote a sound understanding of the analysis process and ensure the credibility of the findings and recommendations of the consultant. It is recommended that the County appoint an in-house coordinator to work closely with LAC. This individual will assist in researching and compiling required maintenance data and act as a liaison between the Committee and staff.

The committee will consist of selected field and office operational personnel and key County staff. They will work with the project team on the current system status, overall system concepts and proposed improvements or enhancements.

End Product: A Committee and study coordinator appointed to work with LAC to ensure evaluation and implementation credibility and assist in data research.

TASK 1.4 - CONDUCT ORIENTATION

In order to establish a uniform understanding of the system and LAC's role between the Committee and the project team, a general orientation session will be conducted during the second week of the project. During this meeting, LAC will describe the proposed approach, the schedule, and identify any potential problems in detail. In addition, a review of a systematic approach will be given to all Committee members along with what information will be researched and compiled. Further, the results and benefits that can be expected from the implementation will be outlined.

End Product: A uniform understanding between staff participating in the process and LAC as to the project objectives, work methods, and schedule.

TASK 2 – REVIEW CURRENT DATABASES

LAC fully understands the MMS (MaintStar) database. However, other databases exist in the County that are being used for other permitting and operations issues. LAC will review all of the County's current databases including the Microsoft Access based system, used for tracking inventories, and any other database that relate to road, stormwater and traffic maintenance. LAC will look at the various inputs and outputs of each existing system and develop an understanding of how the data is processed. A general logic flow will be developed. LAC will interview the County staff that manage and use these operations and database.

End Product: An outline of the current databases operation for tracking maintenance for M & O will be prepared.

TASK 3 – DOCUMENT MISSING ELEMENTS

A comparison of the existing County operation will be made with desired goals for the system. Areas not covered or lacking from the desired outcome will be documented. An outline of the County's current system with functions that are operational and any efforts needed to meet the desired goals will be prepared.

This information will be compiled and presented to the Review Committee. All comments and input from the Committee will be outlined.

End Product: An outline of current system deficiencies will be prepared and efforts estimated to meet the County's goals.

TASK 4 – DEVELOP SYSTEM GOALS

This task involves a review of the system requirements and evaluation of the MaintStar software system options and existing capabilities. This task will be used to finalize the appropriate system for the Department. First, the initial list of potential goals of the system (from above) will be outlined by LAC showing how the goals can be successfully met. This data will be refined and summarized by the Committee with input from County staff. LAC will document this in a working paper and present the options to the Committee. LAC will then assist in building a consensus to the system evaluation and implementation approach.

After consultation with potential users, LAC will outline the needs and goals of the new system and prepare a presentation. The Committee will then meet and finalize the County's desired goals for the configuration of the MaintStar computerized management system.

End Product: LAC will evaluate MaintStar capabilities and options and outline an approach to be taken.

GROUP II – TRAINING AND GUIDANCE IN SYSTEM SETUP

Once specific technology needs have been identified in Group I to help manage the County's maintenance operation, LAC and the Review Committee will address the specific nature of the needs and configuration requirements required by the maintenance management software.

TASK 5 –INSTALL SOFTWARE FOR ENGINEERING AND NEW PERMIT USERS

The MaintStar software will be installed by the County's IT with LAC support on the County's computer network for access by permit users. This work will be done in conjunction with other MaintStar users. The software will be either thin, thick or terminal service connections to match speed and update requirements. LAC will also ensure that the security rights and users are populated correctly to ensure system integrity. LAC will check the operation of each workstation to ensure correct operation with support of information systems. Finally, this task will be used to ensure that proper documentation is acquired or prepared. This effort will require coordination with engineering and information systems departments.

End Product: Software will be loaded and operational on the County's system with security established.

TASK 6–CONFIGURATION OF SOFTWARE

LAC will make sure that the installation and configuration of the software package complies with the expectations and objectives of the Department. LAC will advise the County on issues it believes may conflict with the effective implementation of the software. LAC will make sure that the installation will match the guidelines and goals established. LAC will coordinate with the County's Information Services Department and the software vendor to convert and/or link the current Microsoft Access permit database. Effort will be made to make sure that all the data is moved over to the new system. If further population of the new database is required, LAC will facilitate the completion of these needs. LAC will ensure the database is structured in a manner that matches the current mode of operations within the Department.

Interfaces to outside software applications (i.e. GIS) will be reviewed at this point and preparations will be made to setup the connectivity.

End Product: Software configuration and setup will be accomplished.

TASK 7 – SOFTWARE TRAINING SUPPORT

It is anticipated that even after training has been provided by the vendor, further training (or coaching) will be necessary to acclimate the permit and engineering staff to the new software package and its functionality. Acting not as an agent to the vendor, but as consultants for the County, LAC will provide the agency with additional coaching. If needed, LAC will make the necessary contact with the vendor to determine the most appropriate actions to take. LAC will also provide telephonic support and training sessions if necessary.

End Product: LAC will provide back-up training, coaching and telephonic support if necessary.

TASK 8 – LABOR AND PERMIT TYPES

Transfer of data of all classifications of employees, including hourly rates burdened with benefits and overhead will be generated along with a complete listing of employees, their classifications, hourly rates, employee numbers and work hours.

Permit types and tasks performed will be transferred and/or populated into the MaintStar database. This list will include a description of the type, tasks, a unit of measure to calculate the work accomplished and a physical feature inventory item on which the work is performed.

End Product: A list of all work parameters transferred into the MaintStar software.

TASK 9 - DEVELOP AND IMPLEMENT A PERMIT SYSTEM

Setup, populate and establish the processes used in all aspects of inspection work. LAC will develop a process to integrate the current work orders, complaints and agency requests into the MaintStar software and train staff to use it. The system will generate backlog information and provide a method for staff to monitor and to meet day-to-day permit needs.

The system will establish capabilities to assign a priority to each work permit, which can be used to schedule work. The system will also allow for changes or modifications of these codes.

Further, LAC will guide the staff in utilizing this system to manage permits. Guidance and support in the establishment of a process for scheduling the work with Maintenance and Operations will occur.

End Product: An automated work permit system established.

TASK 10 - MONITOR ALL PROCEDURES

LAC will present and teach all processes and reporting procedures to the appropriate personnel and monitor during the first four months of implementation to ensure compliance. LAC will monitor and make adjustments to allow for functionality of the system.

End Product: LAC will provide guidance for a fully functional permit tracking system.

TASK 11 - DEVELOP SYSTEM DOCUMENTATION MATERIALS

A series of documents outlining the system and management processes will be developed as a reference and guide for applying the newly developed permit configuration. The following manuals will be included to document the various procedures and processes required for operating and administering the MMS:

- Field Manual (5 copies) – for use by those in the day to day permit process. This will be a short and concise manual that will contain reporting procedures, work evaluation and control procedures, and other materials appropriate for field use.
- Operations Manual (two copies) – to be used by management level personnel. It will include a system description, detailed operating procedures for maintaining the system and all related documentation on activities, service levels, planning and controlling reports and source data used to develop the MMS.
- Computer User Manual – Provided by Bender (MaintStar).

End Product: Complete documentation of the permit system.

TASK 12 - CONDUCT IMPLEMENTATION TRAINING

Training and coaching efforts will be conducted to ensure that system and management processes are understood and applied. In addition, a series of meetings with various management staff will be held throughout the implementation, to encourage continuous involvement, to enhance the tailoring of systems and processes, and to allow the ideas offered by staff to be used in system development. A total of 5 days will be allocated for the training.

LAC will conduct a series of training sessions at three different intervals during the process. These will include one basic for the permit establishment and tracking and another for managing the process. The sessions will include both general management training and actual implementation directions. The third training session will detail the use of computer operations in the MaintStar system. Staff will be trained on the entry of data, production of reports, system parameters and database update.

End Product: Conduct implementation training sessions.

TASK 13 – REVIEW COMMITTEE MEETINGS

A series of review committee meetings will be conducted at key milestones in the study. The status of the implementation, deliverables and potential problems will be presented to the Committee for input and direction. Three meetings will occur: at the completion of the permit process, the completion of the permit system training and loading and a final meeting at the end of the project to present completion of the project.

End Product: A series of review committee meetings.

TASK 14 - MONTHLY STATUS AND SUPPORT

Monthly status reports will be prepared for the County. These reports will include a listing of all the project tasks with a summary status and a percent complete for each task.

In addition, LAC shall provide a local phone number for support throughout the life of the contract with a minimum of one-year support.

End Product: Monthly status report will be provided, along with local telephone support.

Group III – Enhancement of System and Establishment of 2003-04 Annual Budgets

This group will include guidance of staff in the annual plan update for next year. This will include the review of last year's information from the MMS and ideas for next years work. Improvements from the previous year will be included in the new work plans. LAC will provide training, guidance and mentoring in this effort.

TASK 15 - GUIDE IN UPDATE OF ANNUAL PLAN FOR 2003-4

LAC will assist the County to update their annual plan and use the MMS to project resource needs and work plans. This includes road, traffic and stormwater. The effort will include a several step process where LAC will mentor the County to:

1. Update of all activities, work methods and guidelines using improvements and enhancements from the previous year.
2. Estimate service levels for each activity (50+) by district (5) and Countywide.

3. Prepare workloads by activity based on best management practice.
4. Level and balance resources based on desired work and available financial resources.
5. Estimate and complete a performance based budget by district and by program and activity with all labor, equipment, material and overhead costs.
6. Guide in annual budget preparation using the work plans created in the MMS.
7. Modify budget based on financial constraints and County desired services levels.
8. Level work plan and determine specific resource needs.
9. Reconfigure system to match approved budget.
10. Review and educate staff (three sessions) to prepare initial budget submittal and link to MMS.
11. Guide in use of automation and system use. Assist in linkage to GIS and guide in establishment of MMS tables the county can connect to the GIS. This will include roadway segments, ponds and intersections that already exist in the County's GIS. LAC will link existing shape files. Any other support for modification of shape files or adjustment in the County's GIS would be done by LAC either through a change in the scope or on an additional hourly basis.
12. Monitor use of outputs and provide follow-up training for 24 hours.
13. Provide support for 10 additional hours on issues that will arise.

This effort will allow the County to use the MMS fully to prepare specific budget requests.

End Product: Assistance in annual update process with MMS support for 2003-4 budget submittal.

GROUP IV - ESTABLISH INTERNAL REQUEST PROCESS FOR SURVEY AND RIGHT OF WAY LOCATIONS

This group of our approach will be to establish the ability to use the MaintStar database to identify and request support of M&O staff by Engineering for survey and right of way locations. The objective of this group will be to provide support for limited Engineering resources.

TASK 16 – SURVEY AND ROW REQUEST INITIATION

The following tasks are intended to familiarize the County staff with the approach that LAC will take to select and implement the requests for support of Engineering. The tasks will also serve to educate the County on system use and system configuration.

TASK 16.1 - PROJECT STARTUP

During this first task, we will begin our team planning efforts associated with the project. LAC will initiate the project immediately after the contract is signed. LAC staff will conduct an initial meeting with the engineer in charge of survey and right of way location and his key staff along with staff in M & O, who need this support, to review the County's objectives and their perception of the needed system and components.

Structured interviews will also be conducted with key staff that has an impact on all who need or desire to utilize the information. Meetings will be held to further refine our approach and methodology to effectively accommodate the specific needs and desires of the County.

Based on our system observations and discussions in the initial task, LAC will prepare a detailed approach along with mileposts.

End Product: Key County staff will be consulted and concepts for improvements and enhancements will be prepared.

TASK 16.2- REESTABLISH THE REVIEW COMMITTEE

To ensure an effective program, operational effort and credibility with all levels of the organization, a Review Committee will be reconvened similar to task 1. The group, will be comprised of relevant staff of various DPW personnel that shall be updated at major milestones and provide direction to the consultant. In addition, the committee will periodically review progress and accomplishments and provide the consultant with guidance and counsel.

The committee will consist of selected field and office operational personnel and key County staff. They will work with the project team on the current system status, overall system concepts and proposed improvements or enhancements.

A general orientation session with the Committee and the project team will be conducted during the second week of the project. During this meeting, LAC will describe our proposed approach, our schedule, and identify any potential problems in detail.

End Product: A reconvened Committee will be used to work with LAC to ensure evaluation and implementation credibility and assist in data research. A uniform understanding between staff participating in the process and LAC for the project objectives, work methods, and schedule.

TASK 17 – REVIEW CURRENT DATABASES

LAC fully understands the MMS (MaintStar) database. However, other automated and manual databases may exist in the County that are used for support requests. LAC will review all of the County's current databases and look at the various inputs and outputs of each existing system and develop an understanding of how the data is processed. A general logic flow will be developed. LAC will interview the County staff that manage and use these operations and database.

End Product: An outline of the current databases operation for requesting support and documentation.

TASK 18 – DOCUMENT MISSING ELEMENTS

A comparison of the existing County operation will be made with desired goals for the system. Areas not covered or lacking from the desired outcome will be documented. An outline of the County's current system with functions that are operational and any efforts needed to meet the desired goals will be prepared.

This information will be compiled and presented to the Review Committee. All comments and input from the Committee will be outlined.

End Product: An outline of current system deficiencies will be prepared and efforts estimated to meet the County's goals.

TASK 19 – DEVELOP SYSTEM GOALS

This task involves a review of the system requirements and evaluation of the MaintStar software system database options and existing capabilities. This task will be used to finalize the appropriate system for the Department. First, the initial list of potential goals of the system (from above) will be outlined by LAC showing how the goals can be successfully met. This data will be refined and summarized by the Committee with input from County staff. LAC will document this in a working paper and present the options to the Committee. LAC will then assist in building a consensus to the system evaluation and implementation approach.

After consultation with potential users, LAC will outline the needs and goals of the reconfigured system and prepare a presentation. The Committee will then meet and finalize the County's desired goals for the configuration of the MaintStar computerized management system.

End Product: LAC will evaluate MaintStar Capabilities and options, and outline an approach to be taken.

TASK 20 –INSTALL SOFTWARE FOR ENGINEERING AND NEW REOUEST USERS

The MaintStar software will be installed by the County's IT staff with LAC support on the County's computer network for access by both the sender and receiver of requests. This work will be done in conjunction with other MaintStar users. The software will be either a thin, thick or terminal service connection to match speed and update requirements. LAC will also ensure that the security rights and users are populated correctly to ensure system integrity. LAC will check the operation of each workstation to ensure correct operation with support of information systems. Finally, this task will be used to ensure that proper documentation is acquired or prepared. This effort will require coordination with Engineering and IT departments.

End Product: Software will be loaded and operational on the County's system with security established.

TASK 21 –CONFIGURATION OF SOFTWARE

LAC will make sure that the installation and configuration of the software package complies with the expectations and objectives of the Department. LAC will advise the County on issues it believes may conflict with the effective implementation of the software. LAC will make sure that the installation will match the guidelines and goals established. LAC will coordinate with the County's IT department and the software vendor to convert and or link the current documentation process. Effort will be taken to make sure that all the data is transferred for the application. If further population of the new database is required, LAC will facilitate the completion of these needs. LAC will ensure the database is structured in a manner that matches the current mode of operations within the Department.

Interfaces to outside software applications (i.e. GIS) will be reviewed at this point and preparations will be made to setup the connectivity.

End Product: Software configuration and setup will be accomplished.

TASK 22 –SOFTWARE TRAINING SUPPORT

It is anticipated that even after training has been provided by the vendor, further training (or coaching) will be necessary to acclimate the Permit and Engineering staff to the reconfigured software package and its functionality. If needed, LAC will make the necessary contact with the software vendor to determine the most appropriate actions to take. LAC will provide telephonic support and training sessions (10 hours max) if necessary.

End Product: LAC will provide back-up training, coaching, and telephonic support if necessary.

TASK 23 - DEVELOP SYSTEM AND IMPLEMENT FOR ENGINEERING SUPPORT

Setup, populate and establish the processes used in all aspects of requests for engineering support work. LAC will develop a process to integrate with the current work orders, complaints and agency requests and train staff to utilize it. The system will provide a method for staff to monitor and to meet day-to-day support request needs.

The system will establish capabilities to assign a priority to each request, which can be used to schedule work. The system will also allow for changes or modifications of these codes.

Further, LAC will guide the staff in utilizing the system to manage permits. Guidance and support in the establishment of a process for scheduling the work with Maintenance and Operations will occur.

End Product: An automated engineering support system established.

TASK 24 - MONITOR ALL PROCEDURES

LAC will present and teach all processes and reporting procedures to the appropriate personnel and monitor during the first four months of implementation to ensure compliance. LAC will monitor and make adjustments to ensure functionality of the system.

End Product: LAC will provide guidance for a fully functional support request system.

TASK 25 - DEVELOP SYSTEM DOCUMENTATION MATERIALS

A series of documents outlining the system and management processes will be developed as a reference and guide for applying the newly developed permit configuration. The following manuals will be included to document the various procedures and processes required for operating and administering the MMS:

- Field Manual (5 copies) -- for use by those in day to day support effort. This will be a short and concise manual that will contain reporting procedures, work evaluation and control procedures, and other materials appropriate for field use.
- Computer User Manual – already provided by Bender.

End Product: Complete documentation of the support system.

TASK 26- CONDUCT IMPLEMENTATION TRAINING

Training and coaching efforts will be conducted to ensure that system and management processes are understood and applied. In addition, a series of meetings with various management staff will be held throughout the implementation, to encourage continuous involvement, to enhance the tailoring of systems and processes, and to allow the ideas offered by staff to be used in the system development. A total of 5 days are allocated for the training.

LAC will conduct a series of training sessions at three different intervals during the process. These will include one basic session for the permit establishment and tracking and another for managing the process. The sessions will include both general management training and actual implementation directions. The third training session will detail the use of computer operations in the MaintStar system. Staff will be trained on the entry of data, production of reports, system parameters and database update.

End Product: Implementation training sessions.

GROUP V – DEVELOP ABILITY TO STORE ASSET CONDITION RATING INFORMATION

This group of work tasks will allow the County to store information in a database for asset condition as described in FDOT Maintenance rating handbook by roadway segment. LAC and the Review Committee will determine features that will be rated, fields to be established with Maintenance system and configuration requirements required by the maintenance management software. Further, LAC will guide in system use and ability of the County to store and retrieve this data.

TASK 27 – Determine asset features and measurement units

LAC will work with the committee to determine specific features to be included in the database. The FDOT Maintenance rating will be used as a guide. LAC will prepare a suggested grouping of features and measurement units and present to the committee.

The committee will provide input and a list of features with measurement units. This list will be compiled and ability to store in MaintStar determined. Practical features of storage and retrieval will be investigated by LAC.

A short outline of less than ten pages (10) of the assets and their condition measurement scales will be prepared and distributed for comment by the Public Works Director and committee. Finally, LAC will receive all written comments on the list and document planned assets to be managed. This effort will require coordination with the PMS system.

End Product: Asset list along with measurement units and scales will be established in a short working paper (less than 10 pages).

TASK 28 – POPULATE MAINTSTAR DATABASE

LAC will use the agreed list of assets from Task 27 and setup user defined fields (UDFs) in the asset modules of the MaintStar database. This will include a logical establishment of field names, field length and definition with terminology familiar to County staff.

LAC will setup and configure the database to store all desired fields matching agreed upon definitions and condition parameters. The records will match those of the PMS, pond, channel and intersection databases. LAC will configure the system within the limits of the software. If an ability to more effectively establish a system is identified, LAC will provide written rationale to request software changes to the vendor, Bender Engineering.

End Product: Asset fields will be defined and configured matching County's needs.

TASK 29 – ESTABLISH TRIAL DATASET USING ASSET LIST

LAC will use the agreed list of assets and populate a test database set to test the use of the condition rating scheme and asset database.

LAC will present this test database, in MaintStar, to the committee for their review and comment. LAC will take the committee's input and modify the configuration of the MaintStar system to match the committee's desires within the capability and constraints of the software.

End Product: Maintstar configured asset dataset matching the County's desires.

TASK 30 –DEVELOP REPORTS FOR ASSETS STORED

LAC will use the report generator within MaintStar to prepare a series of reports listing the asset data and condition information. LAC will prepare three reports as well as develop and document the database schema for others to retrieve data using other means such as Crystal Reports or Microsoft Access.

LAC will present to the committee and receive input on the format and layout of desired reports. LAC will modify the reports based on comments received from the committee, within the capabilities of MaintStar.

End Product: A series (3) of output reports established to retrieve data from MaintStar on assets and database schema documented.

TASK 31 –DOCUMENT AND TRAIN COUNTY STAFF TO USE

LAC will train three staff members to utilize the asset system and produce outputs. A general demonstration will be given to the committee and LAC will conduct two hands on sessions with three employees on inputting, exporting, displaying, modifying and retrieving information.

LAC will document asset usage in a short five page paper for complete understanding.

End Product: LAC will document asset rating database in short paper and train three staff to use.

GROUP VI – ENHANCEMENT AND ANNUAL SUPPORT FOR 2004-05 UPDATE

This group is divided into 11 tasks. This scope covers effort for support of roads, stormwater and traffic and the associated ROW permitting and internal service request in the annual MMS update.

Through prior work for the County, LAC has assisted in the development of existing systems for roads, traffic and storm water maintenance. The County wants to enhance the use of the existing MaintStar system capabilities and receive mentoring on an annual update for 2004-2005 work plans.

LAC also understands the importance of providing comprehensive training on the software capabilities as well as on-going support to allow the County to maintain and update the system without additional support from the software vendor or other outside agencies.

This scope for this group will include guidance of staff in the annual plan update for next year. This will include the review of last year's information from the MMS and ideas for next years work. Improvements from the previous year will be included in the new work plans. LAC will provide training, guidance and mentoring in this effort.

TASK 32 - CONDUCT ORIENTATION

In order to establish a uniform understanding of the system, the annual update process and LAC's role between the Committee and the project team, a general orientation session will be conducted during the second week of the project. During this meeting, LAC will describe the proposed approach, the schedule, and identify any potential problems in detail. In addition, a review of a systematic approach will be given to all Committee members along with what information will be researched and compiled.

End Product: A uniform understanding between staff participating in the process and LAC as to the project objectives, work methods, and schedule.

TASK 33 - ACTIVITY GUIDELINE REVIEW

LAC will assist County staff to review the activity guidelines and update the following:

1. Additions or changes to the activity list.
2. Activity guideline descriptions and work methods.
3. Crew compositions (labor, equipment and materials).
4. Measurement unit and production target.

All activity guidelines shall be updated by County staff, with assistance from LAC, and distributed to senior team leaders.

End Product: Updated activity guidelines for 2004-5.

TASK 34 - ANNUAL SYSTEM REVIEW

LAC will review with staff the maintenance activities that are performed. The actual data and work performance will be compared with the annual plan. Opportunities for improvements will be identified and discussed. The type and definition of activities will be modified in MaintStar reflecting the County's desires and realities of work being done. Activities will be added, deleted, and/or modified in the system.

End Product: Annual review of work history for 2003-04.

TASK 35 – INVENTORY AND RESOURCE UPDATE

The amount of inventories that relate to the identified activities will be updated in the system to reflect current maintenance responsibility. LAC will guide staff in the update and the County MMS system administrator will actually collect and update the MMS system with the revised inventory amounts. New and modified activities in task 2 may warrant collection by the County of new inventory data.

County staff will also update the system with new labor, equipment and material costs. The County will also provide a new estimate of the overhead rate. LAC will assist in update of the database with these values.

End Product: Annual update of Feature Inventory and Resource Costs for fiscal years 2004-5

TASK 36 – SERVICE LEVEL REVIEW

LAC will assist the County to review frequencies of maintenance for each activity. Comparisons of historical effort by the County versus the condition of facilities will be done. Other data comparable to the County will be used by LAC to guide in this effort.

End Product: Frequency of service level for each activity will be estimated for fiscal year 2004-5

TASK 37 – WORK PROGRAM AND BUDGET PREPARATION

LAC will guide County staff to prepare a work program matching the County's desires and financial resources. The plan will estimate by activity the work units planned, amount of labor required and estimated costs of labor, equipment and materials.

A meeting will occur to update the annual work plans to meet the County's desires. LAC will also train the MMS system administrator to update the annual work plans in the MMS.

End Product: Assist in developing new Annual Work Program and Budget for fiscal years 2004-5

TASK 38 – WORK LOAD DISTRIBUTION

LAC will guide staff to use the system to establish a monthly program matching available resources. The final work program will be spread over the year by month. Work days for each activity will be determined by month using information from the activity guidelines and input from Senior Team Leaders.

End Product: Assist the County in establishing workload distribution for fiscal year 2004-5

TASK 39 – RESOURCES REQUIRED

Staff will use the system, under guidance and support by LAC staff, to estimate the number of equipment units (such as pickups, mowers, etc.), material units and labor resources by month needed to complete the plan.

End Product: Resource requirements by month for fiscal year 2004-5

TASK 40 – BI-WEEKLY SCHEDULING

LAC will support the County throughout the year to schedule work on a short-term basis. This includes training, guidance and coaching in scheduling work. LAC will attend, at a minimum, two (2) scheduling meetings with the Team Leaders over the course of the contract.

End Product: Provide support and review of work scheduling process.

TASK 41 – MONTHLY PROGRESS REVIEW

LAC will establish a monthly review meeting with management staff to review system outputs and guide in use of the system for improving operations and understanding what work has been done. LAC will provide hands-on training of report interpretation as needed. A minimum of two (2) monthly meetings will be attended.

End Product: Monthly progress meetings will be attended and reports reviewed

TASK 42 – GENERAL SUPPORT

LAC will provide ongoing support (24 hours) in review of the database, work reporting, update of various system components and support of links to the GIS. This will include support in annual update of manuals, general telephone counseling, activity evaluation and analysis and minor technical support.

End Product: General support provided

GROUP VII – ENHANCEMENT AND ANNUAL SUPPORT FOR 2005-06 UPDATE

This scope of this group is divided into 11 tasks. This scope covers effort for support of roads, stormwater and traffic and the associated ROW permitting and internal service request in the annual MMS update. This effort will be similar as 2004-5 except support will be more of monitoring and enhance type of effort than the training and direction in Group 6.

Through prior work for the County, LAC has assisted in the development of existing systems for roads, traffic and storm water maintenance. The County wants to enhance the use of the existing MaintStar system capabilities and receive mentoring on an annual update for 2005-2006 work plans.

LAC also understands the importance of providing comprehensive training and mentoring on the MMS software capabilities as well as on-going support to allow the County to maintain and update the system without additional support from the software vendor or other outside agencies.

This scope will include guidance of staff in the annual plan update for next year. This will include the review of last year's information from the MMS and ideas for next years work. Improvements from the previous year will be included in the new work plans. LAC will provide training, guidance and mentoring in this effort.

TASK 43 - CONDUCT ORIENTATION

In order to establish a uniform understanding of the system, the annual update process and LAC's role between the Committee and the project team, a general orientation session will be conducted during the second week of the project. During this meeting, LAC will describe the proposed approach, the schedule, and identify any potential problems in detail. In addition, a review of a systematic approach will be given to all Committee members along with what information will be researched and compiled.

End Product: A uniform understanding between staff participating in the process and LAC as to the project objectives, work methods, and schedule.

TASK 44 – ACTIVITY GUIDELINE REVIEW

LAC will assist County staff to review the activity guidelines and update the following:

5. Additions or changes to the activity list.
6. Activity guideline descriptions and work methods.
7. Crew compositions (labor, equipment and materials).

8. Measurement unit and production target.

All activity guidelines shall be updated by County staff, with assistance from LAC, and distributed to senior team leaders.

End Product: Updated activity guidelines for 2005-6.

TASK 45 – ANNUAL SYSTEM REVIEW

LAC will review with staff the maintenance activities that are performed. The actual data and work performance will be compared with the annual plan. Opportunities for improvements will be identified and discussed. The type and definition of activities will be modified in MaintStar reflecting the County's desires and realities of work being done. Activities will be added, deleted, and/or modified in the system.

End Product: Annual review of work history for 2004-5.

TASK 46 – INVENTORY AND RESOURCE UPDATE

The amount of inventories that relate to the identified activities will be updated in the system to reflect current maintenance responsibility. LAC will guide staff in the update and the County MMS system administrator will actually collect and update the MMS system with the revised inventory amounts. New and modified activities in task 2 may warrant collection by the County of new inventory data.

County staff will also update the system with new labor, equipment and material costs. The County will also provide a new estimate of the overhead rate. LAC will assist in update of the database with these values.

End Product: Annual update of Feature Inventory and Resource Costs for fiscal years 2005-6.

TASK 47 – SERVICE LEVEL REVIEW

LAC will assist the County to review frequencies of maintenance for each activity. Comparisons of historical effort by the County versus the condition of facilities will be done. Other data comparable to the County will be used by LAC to guide in this effort.

End Product: Frequency of service level for each activity will be estimated for fiscal year 2005-6.

TASK 48 – Work Program and Budget Preparation

LAC will review and provide input to County staff to prepare a work program matching the County's desires and financial resources. The plan will estimate by activity the work units planned, amount of labor required and estimated costs of labor, equipment and materials.

A meeting will occur to update the annual work plans to meet the County's desires. LAC will also review and guide the MMS system administrator to update the annual work plans in the MMS.

End Product: Assist in developing new Annual Work Program and Budget for fiscal years 2005-6.

TASK 49 – WORK LOAD DISTRIBUTION

LAC will review the staff's use of the system to establish a monthly program matching available resources. The final work program will be spread over the year by month. Work days for each activity will be determined by month using information from the activity guidelines and input from Senior Team Leaders.

End Product: Assist the County in establishing workload distribution for fiscal year 2005-6.

TASK 50 – RESOURCES REQUIRED

Staff will use the system, under guidance and support by LAC staff, to estimate the number of equipment units (such as pickups, mowers, etc.), material units and labor resources by month needed to complete the plan.

End Product: Resource requirements by month for fiscal year 2005-6.

TASK 51 – BI-WEEKLY SCHEDULING

LAC will support and monitor the County throughout the year to schedule work on a short-term basis. This includes training, guidance and coaching in scheduling work. LAC will attend, at a minimum, two (2) scheduling meetings with the Team Leaders over the course of the contract.

End Product: Provide support and review of work scheduling process.

TASK 52 – MONTHLY PROGRESS REVIEW

LAC will monitor a monthly review meeting with management staff to review system outputs and guide in the use of the system for improving operations and understanding of

what work has been done. LAC will mentor a hands-on approach in the report interpretation as needed. A minimum of two (2) monthly meetings will be attended.

End Product: Monthly progress meetings will be attended and reports reviewed.

TASK 53 – GENERAL SUPPORT

LAC will provide ongoing support (36 hours) in review of the database, work reporting, update of various system components and support of links to the GIS. This will include support in the annual update of manuals, general telephone counseling, activity evaluation and analysis and minor technical support. This will be as directed by the County's project manager in writing.

End Product: General support provided.